

# MISS – METHODOLOGY FOR THE IDENTIFICATION OF STRATEGIC STAKEHOLDERS OF AN ORGANISATION

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## Abstract

**Background.** Taking the nature and dynamics of the environment of modern organisations into account, it is necessary and crucial to manage stakeholders, which is effective when such groups are identified that actually determine the organisation's ability to achieve its goals. The need to identify stakeholders is also justified by the overriding management goal of maximising the value of an organisation, as stakeholders can be regarded as the areas of value growth in the environment or those who have value-creation factors. Both the results of a literature review and the author's experience in management practice imply the need to develop tools accessible for decision-makers to support the identification of stakeholders and to analyse and evaluate their influence on the organisation's functioning.

**Research aims.** The purpose of the paper is to present in detail an original methodology for identifying the organisation's strategic stakeholders, which will address the research problem by assessing the influence stakeholders have on the achieving the organisation's strategic objectives and, consequently, identifying the stakeholders of strategic importance.

**Methodology.** The MISS is a methodology with a set of tools supporting managers in analysing and evaluating the internal and external environment of their organisation, which is comprised of various stakeholder groups. An analysis and evaluation are conducted in a multi-stage manner and lead to the prioritisation of stakeholders and the emergence of those of strategic importance to the functioning of the organisation studied. Data collection methods for the MISS are focus group interviews and individual structured interviews.

**Key findings.** The MISS supports decision-making in organisations by enabling decision-makers to systematically assess the direct and indirect impact potential of stakeholders on the strategic goals of the organisation. The results of the analyses indicate the elements of the system (the organisation's environment) of the highest value, thus determining the allocation of resources. The conclusions also show the

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application potential of the MISS in the broader context of organisation management, the model's limitations, as well as future research directions.

**Key words:** stakeholders, stakeholder identification, organisation's environment, strategic management

## INTRODUCTION AND BACKGROUND

The organisation's environment is a unique and dynamic configuration of diverse stakeholder groups. Such an understanding of the environment highlights the fact that the organisation functions in a multi-level, dynamic structure of bonds, which consequently poses the challenge of managing this structure (Czakov, 2005). When looking at an organisation as a "constellation of cooperative and competitive interests possessing intrinsic value" (Donaldson, & Preston, 1995, p. 66) embedded in its akin environment, attention to stakeholders is emerging as a critical strategic issue. It becomes crucial to understand "the role of a particular firm as a whole and its relationships to other social institutions" (Freeman, 1984, p. 91) and to define an enterprise strategy (Schendel, & Hofer, 1979) that articulates the relationships with stakeholders.

Stakeholder management is a strategic issue not only because coexistence in the dynamic configuration of the elements of the environment is a condition for doing business in general, but primarily because corporate attention to a wide group of stakeholders is being increasingly linked to sustainable competitive advantage (Kacperczyk, 2009). Hence, relationships with stakeholders actually may be a source of competitive advantage, regardless of whether they are considered a strategic resource or an instrument for responding to changing environmental conditions (Czakov, & Klimas, 2010).

The growing number and variety of stakeholders, their interconnectivity, contradictory interests and demands, together with institutional asymmetries (Sławik, 2011) and the chaotic environment result in the need to prioritise them, as satisfying all stakeholders may prove unfeasible. Mitchell et al. (1997) argued that managers who do not prioritise and classify stakeholders to their interests do not realise the importance of stakeholders. Yet stakeholder identification and classification remains a challenging task even for researchers (Kaler, 2002). While the stakeholder

literature points to the opportunities and threats that stakeholders pose, to date, stakeholder theorists have not focused on how strategic issue classification might direct attention to stakeholders. Instead, stakeholder scholars have emphasised the attributes of stakeholders – e.g. their power, legitimacy, and urgency (Mitchell et al., 1997) – as the key factor in making stakeholders salient to managers. However, it is not easy for managers to prioritise stakeholders based on these attributes because this approach does not actually identify stakeholders (Jawahar, & McLaughlin, 2001).

After a thorough literature review (both conceptual and empirical in nature) and based on professional experience in organisation management, a need to develop a systematic, standardised approach to identifying an organisation's strategic stakeholders was observed. There is not enough attention and thought given in the literature to the link between stakeholders' impact and the ultimate goal of organisations which is the ability to create value and its growth over time. Most importantly, a knowledge gap was noticed regarding comprehensive frameworks that deal with stakeholders' influence on enterprise strategy, and tries to measure this influence on the execution of an organisation's actual goals. For instance, the broad review of the literature on stakeholder identification and classification by Kumar's et al. (2015) indicated that many previous studies developed stakeholder identification/classification models in the light of social, environmental, and sustainability strategies or business ethics, and focused on stakeholders' interests, preferences, expectation or claims towards an organisation. The model presented in this paper takes an inside-out perspective, allowing organisational decision-makers to concentrate on value creation through the execution of an organisation's strategic goals, and is oriented toward the interests of an organisation. This does not exclude accountability or sustainability notions, but also does not narrow the assessment to any particular policy.

The research problem was formulated in the form of the following question: How to assess the influence of stakeholders on the achievement of an organisation's strategic goals and, consequently, how to identify strategic stakeholders? To date, a not significant number of researchers have tried to resolve this question, and their studies are mostly based on intuitive and simple reasoning methods which are error-prone. Papers regarding stakeholder identification, classification

or prioritisation mainly used methods such as literature studies, interviews with executives, textual analysis of extensive archival documentation, and cognitive mapping techniques (c.f. e.g. Crilly, & Sloan, 2012), questionnaires (cf. e.g. Leventon, 2016), and rarely the AHP method (cf. e.g. Jackson, 2001; Knezevic et al., 2015), which actually can be a recommended alternative approach to tackling the research problem.

The paper presents the solution to the stated research problem in the form of an original methodology called the Methodology for the Identification of Strategic Shareholder (MISS), consisting of a set of tools and a research procedure. The main aim of the article is to provide both practitioners and researchers with a comprehensive model and its typology of shareholders in order to support them in identifying stakeholders that are responsible for the creation or destruction of an organisation's value. The results obtained in this approach can be further utilised in decision-making regarding, for instance, prioritising the competitive interests of stakeholders and resource allocation among them. The focal point of the MISS is not on stakeholders' needs (as in most previous studies cited herein) but their impact on the execution of company strategy. Also, unlike other models, this one does not involve stakeholder participation in the analysis, and it relies on managerial perception of stakeholder influence on organisational strategy. One of the assumptions underlying the MISS is that attention to stakeholders should not only be the result of objective external influences but should also be based on how managers conceptualise their organisation and its relationship with the environment. Thus the MISS combines a systematic attempt to examine and define stakeholders' role and impact in an analysed system with managers' interpretation of information pertaining to stakeholders (Henriques, & Sadorsky, 1999).

The main content of the article embraces a detailed description of the MISS and is structured in such a way as to present the phases and tools within the framework as they appear in a research procedure. This is: the identification of an organisation's stakeholders, the allocation of their roles within the organisation and the identification of critical stakeholders, the selection of indicators and measures of the achievement of the organisation's strategic objectives and the identification of key stakeholders, and finally the identification of strategic stakeholders. Before the model is introduced, examples

of research objectives using this methodology, the operationalisation of concepts important to a correct understanding thereof and theoretical assumptions, as well as the new typology of the organisation's stakeholders are presented, together with a brief reference to the recommended methods for data collection for the framework application and suggested research participants. The paper is concluded with the application potential of the MISS, its limitations, and recommendations regarding areas worthy of further scientific interest.

## **RESEARCH OBJECTIVES, A HYPOTHESIS AND THE OPERATIONALISATION OF THE CONCEPTS USED**

Research using the MISS allows the achievement of the following potential goals:

1. Describing the current practice of stakeholder identification of the organisations studied.
2. Comparing the results of the process of identifying strategic stakeholders of the organisations studied, conducted according to the MISS, with the results of the previous practice of identifying strategic stakeholders in these organisations.
3. Comparing the results of the process of identifying strategic stakeholders of the organisations studied, conducted according to the MISS, for the various simulated scenarios of events in their environment.
4. Evaluating the suitability of using the MISS in managing the organisations studied.
5. Based on research findings, formulating recommendations for the organisations studied regarding stakeholder management.

A basic research hypothesis verified by means of the MISS assumes that the set of strategic stakeholders identified by the MISS differs from the set of strategic stakeholders indicated by an intuitive approach.

In order to unambiguously interpret the key terms used in the MISS, they are defined in Table 1.

**Table 1.** Operationalisation of the terms and concepts used

TERM	DEFINITION
<b><i>An organisation's stakeholder</i></b>	<p>Based on the review of the definitions of stakeholders (v. Ślawik, 2012), it is observed that these definitions can be differentiated by how broad the term stakeholder is, according to their authors, and thus, <i>broad</i> and <i>narrow</i> definitions can be distinguished. <i>Broad</i> definitions, matching research realities, assume that virtually any entity can influence or be influenced by the organisation's operations. <i>Narrow</i> definitions, referring to the realities of management practice, in particular the limited resources of the organisation, including the limited time and attention of managers who are unable to accommodate and respond to all requests from all potential stakeholders, are focused on one criterion or some narrowly defined criteria or specific attributes of entities that may be considered the organisation's stakeholders.</p> <p>M.R. Freeman and D.L. Reed propose both a broad definition, and a narrow definition of the stakeholder, assuming that this is only an identifiable group or individual who the further existence (survival) of the organisation depends on (Freeman, &amp; Reed, 1983, p. 91). The authors also point out, given the organisation's strategy, that a stakeholder must be understood in a broad sense (Freeman, &amp; Reed, 1983, p. 91). R.K. Mitchell et al. (1997, p. 854) also suggest using a broad definition in order not to exclude, arbitrarily or a priori, any of the actual or potential stakeholders in the further identification process. Sharing this view, the author defines the term company's stakeholder broadly, and then narrows it, based on precisely defined criteria in subsequent stages of the applied MISS. The narrow definition of a stakeholder is specified by the appropriate epithet in order to show that this is a set of stakeholders selected in the multi-stage identification process. In this way, the types of stakeholders (<i>critical, key, and strategic</i>) are defined.</p> <p>For the purpose of the MISS, the following definition of <i>a company's stakeholder</i> is adopted, originating from the classic definition by R.E. Freeman (1984, p. 46): "A stakeholder is any identifiable individual, group or organization who can affect or is affected by the achievement of the organization's objectives".</p>
<b><i>Stakeholder management</i></b>	<p>Starting with the functional definition of the management process, for the purposes of this approach, stakeholder management is the process of identifying stakeholders of the organisation and, in particular, planning, organising, and taking action, taking actual or anticipated stakeholder behaviour into account, with the intention of achieving the organisation's goals.</p>
<b><i>Stakeholder identification</i></b>	<p>A process that involves identifying the organisation's stakeholders, including gathering information about them, their analysis and evaluation, mainly in terms of their actual and potential influence and other attributes, intentions, and behaviours, and also, as a result of the evaluation according to the selected criteria, stakeholder prioritisation, e.g. by their classification allowing for determining the importance of a stakeholder for the organisation. Stakeholder identification is a key to their effective management. Its results provide an important input for management decision-making. In the MISS, an identification process is carried out on several occasions and with reference to different sets of stakeholders.</p>

Table 1. cd.

TERM	DEFINITION
<b><i>Stakeholder salience</i></b>	A hierarchy of priorities given to the competitive needs/demands of stakeholders by the company's management (cf. Mitchell et al., 1997, p. 854).
<b><i>A crisis situation of the organisation</i></b>	For the needs of the MISS, it is assumed that a crisis situation is a special decision-making situation characterised by a short response time, a high degree of uncertainty, and the presence of a surprise element; it is most often manifested by the fact that the business activity is permanently disturbed, the achievement of its strategic objectives is compromised, its control over its business is actually or apparently lost, its internal balance is compromised, its financial condition has deteriorated, development opportunities are limited, and its image may be destroyed (Žmija, 2011, pp. 21–22). C.M. Pearson and J.A. Clair suggest defining the crisis situations of the organisation from the perspective of its stakeholders, describing them as “unlikely and significant situations that are perceived by critical stakeholders as those threatening the ability of the organisation to function and that are subjectively experienced by these stakeholders as personally or socially threatening” (Pearson, & Clair, 1998, p. 66). They add that different stakeholders define crisis situations in a different way. Moreover, according to M. Porter, the crisis situation of the company leads to, in particular, a negative change in its position in the sector. It should be stressed that in research using the MISS, a stakeholder from the perspective of whom a crisis situation is defined is managerial staff.
<b><i>Key performance indicators (KPIs)</i></b>	A set of measures defined individually for an organisation and its managerial staff over a given period, used to assess a degree to which the organisation's strategic goals are achieved.
<b><i>A critical stakeholder</i></b>	A stakeholder who plays a significant role in the company's environment (in terms of the importance of the influence and the ability to evoke a reaction in the environment). The role of a stakeholder is <i>significant</i> , if on the map of stakeholder role allocation in the environment (discussed further, see Figure 3 below), the point with the coordinates assigned to the stakeholder is above the line defined by the point with the coordinates of the marginal value of the active sum and the point with the coordinates that are the marginal value of the reactive sum in the set of the organisation's stakeholders (OS). The identification of critical stakeholders is based on the respondents' answers in the matrix of the stakeholder mutual influence (discussed below, see Figure 2). Critical stakeholders are the set with the CS symbol.
<b><i>A key stakeholder</i></b>	A stakeholder who exerts or is able to exert a significant direct influence on KPIs within the assumed time. The influence of a stakeholder is significant if the total value of a stakeholder influence on the organisation's KPIs (TVI) is higher than the TIV's arithmetic mean for the set of the organisation's stakeholders (OS). Key stakeholder identification is based on the indications of respondents included in the matrix of the stakeholder influence on KPIs (discussed below, see Figure 4). Key stakeholders are the set with the KS symbol.

Table 1. cd.

TERM	DEFINITION
<b>A strategic stakeholder</b>	Due to the basic research hypothesis verified by the MISS, determining the fact that according to the research procedure, strategic stakeholders are identified by the respondents twice (during the first application of the methodology), the following two types of strategic stakeholders are distinguished:
<b>– an indicated strategic stakeholder</b>	– a stakeholder who exerts or is able to exert a significant, direct, or indirect influence on the achievement of the organisation's strategic goals, indicated by the respondents from the set of stakeholders of the organisation studied (OS) before using the MISS. The influence of a stakeholder is significant if they can lead to a change in the organisation's crisis situation. The indicated strategic stakeholders are the set with the iSS symbol;
<b>– a verified strategic stakeholder</b>	– a stakeholder who exerts or is able to exert a significant, direct or indirect influence on the achievement of strategic goals of the organisation within the assumed time, measured by its influence on the KPIs and/or parameters that determine its location on the map of the stakeholder role allocation in the environment; it is indicated by the respondents from two sets: the Critical Stakeholder Set (CS) and the Key Stakeholder Set (KS), formed as a result of using the MISS. The influence of a stakeholder is <i>significant</i> if they can lead to a change in the company's crisis situation. Verified strategic stakeholders are the set with the vSS symbol.

Source: own study.

## The new typology of the organisation's stakeholders

The typology of the organisation's stakeholders used in the MISS can be viewed as an alternative or supplement to the numerous types of stakeholders most frequently referred to in the relevant literature (for a review of selected typologies of organisation's stakeholders v. e.g. Kumar et al., 2015; Sławik, 2012). Current approaches to classifying stakeholders often do not match the contemporary reality of management practice, as they are either too general or too detailed, which weakens their applicability, or the criteria for separating particular types of stakeholders are irrelevant or immeasurable. First of all, however, most typologies proposed in the literature are used to develop management theory rather than practice, and those that can be implemented in organisations are more suited to retrospective analyses than to support management decision-making, which the MISS aspires to.

With regard to the mentioned deficiencies of the existing typology, the author uses her own typology for the needs of the MISS, distinguishing the following types of stakeholders defined above: key stakeholders, critical stakeholders, and strategic stakeholders. This distinction is



sufficient and effective for decision-making in organisational management practice, as it allows managers to focus attention and other resources on strategically relevant stakeholders (by identifying those who actually influence or may influence the organisation's strategic goals). Identifying the characteristics or properties of stakeholders (e.g. power, legitimacy, and urgency), the types of relationships that link them to the organisation (explicit/contractual, hidden, and unrecognised) has secondary importance in business decision making and is mostly used to develop theories. The argument in favour of the fact that the use of detailed, extended typologies and at the same time with immeasurable division criteria is not justified as regards application, is that the boundaries between the different types of stakeholders are blurred, especially in the age of turbulence and chaos (Kotler, & Caslione, 2009). The MISS and its stakeholder typology aim to assist managers in prioritising the competitive needs of stakeholders, i.e. evaluating the importance of individual stakeholders for the organisation, and supporting the decision-making processes in organisations.

The adopted terminology was built according to the following logic:

- a strategic stakeholder as they have an impact on the organisation's strategic goals,
- a key stakeholder as they have a direct impact on KPIs,
- the term critical stakeholder is a borrowing from the Sensitivity Model by Vester (2007), from the concept of critical variables in the system.

Furthermore, after identifying strategic stakeholders, the nature of the stakeholders' influence on the organisation's strategic objectives is determined within the developed methodology.

## **The recommended methods for data collection for the MISS application**

A recommended research method for collecting data necessary to use the MISS is focus group interviews or individual structured interviews conducted during qualitative field research. At the first stage of the research procedure, based on the mapping of an organisation's stakeholders, it is recommended to conduct free interviews to collect data on the specific nature of business activity in a given market or sector, including the sources of competitive advantage, and to learn about the business model of the organisation. At the subsequent stages, the

choice between focus group and structured interviews depends on the number of research participants (the second method allows the MISS to be used with one respondent).

Focus research or individual interviews are conducted based on a detailed scenario developed by the author for particular focus sessions/interviews. It contains detailed instructions for respondents, the definitions of all terms applied, and the interpretation of rating scales used. It is mentioned that, based on the interview scenario, a multimedia presentation was also prepared, which can be displayed during the session, providing a visual supplement to the information provided by the moderator.

The justification for recommending these methods, as well as the overriding issue in designing the MISS, was the possibility of a convenient application in practice, but which did not require the promotion of the accuracy of the method. The practice of company management requires that methods and tools used should be easy to use and, above all, time and resource efficient, even at the expense of simplifying the reality to acceptable levels. Methods that are too complex and too absorbing for managers are simply useless. This is confirmed by F. Ackermann and C. Eden (2003), who argue that one of the most difficult aspects of dealing with a stakeholder issue is justification for the effort and time involved in discussing it. Although taking the influence of stakeholders in company management into account is logical and unquestionable, it is not always effective to devote time to discussing who stakeholders are and how best to manage them. This may be due to the lack of available methods or lack of examples, when the effort of deeper stakeholder analysis resulted in significant benefits. Another reason may be problems and, consequently, reluctance to study qualitative factors/ variables in general, which often results in omitting them in analysis and focusing on quantitative variables (Zimmiewicz, 1999, p. 121). Business practice is also two extreme approaches to the issue of stakeholder influence: the first, passive one, which says that stakeholders have so much control over the future of an organisation that the organisation can only react to their behaviour; the second, intuitive and arrogant one, which says that stakeholders are somehow automatically well-managed (Ackermann, & Eden, 2003).

The advantage of a focus groups method is its effectiveness, namely that it allows for gathering all research participants at the same time and, if required, agreeing on the common position of the respondents

on the issues discussed. The advantage of the method is also that it is closest to the natural conditions and methods of decision-making in the organisation, as it allows the preservation of a typical hierarchical structure of forces and related mutual interpersonal influence of the group and its dynamics. Additionally, the limited time of a focus session simulates the effect of time pressure, which is an inherent part of decision making in organisations. For these reasons, the use of the focus groups method is more likely to bring the research situation closer to the actual conditions of the organisation's decision-making process than conducting individual interviews, for example, among many respondents, and then using statistical methods or mathematical models to rank and average their opinions.

In order to better interpret the results obtained in the MISS approach, to formulate recommendations for organisation management or to verify the hypotheses made by the researchers, it is recommended to use other complementary data collection methods, such as free interview, in-depth interview, survey, or the examination of the documents of organisations studied.

## **Recommended research participants**

Using the MISS, the following should be emphasised: the effectiveness and efficiency of the tools used depend on the competence of the human resources of the organisations studied, in particular on the participants' knowledge and experience. As in every process, the quality of input data will determine the quality and the possibility of using output data (conclusions). Therefore, the representatives of managerial staff of the organisation studied are recommended participants in the research using the MISS. According to S. Fineman and K. Clarke (1996), decision-makers in organisations are those who identify stakeholders and interpret who the stakeholders are. It is managers who assess whether and to what extent an individual stakeholder influences the organisation's functioning and the achievement of the company's goals. In research by M. Hagan (2004), managers' perception of the influence of the stakeholder on the core business of the organisation, including a company, a business unit, or the area of market activity (the perception of the relationship) was considered as a key factor (in addition to power, legitimacy, and urgency) leading to reaction, e.g. taking action towards such a stakeholder.

For these reasons, the recommended respondents in research with the use of the MISS are board members and top managers. By applying the MISS to the selected areas of the organisation's activity and thus only to the selected stakeholder groups, research participants may and should be decision makers responsible and best-informed in the area studied, i.e. line managers.

### **Vester's Sensitivity Model as a source of the MISS design assumptions**

The MISS was created based on the selected elements of the Sensitivity Model by F. Vester (2007) and tools used in this approach. The Sensitivity Model is used to analyse and manage complex systems such as a company. The approach developed by F. Vester derives from cybernetics and is based on the concept of interconnected thinking. Its goal is to better deal with the ever more complex problems of the surrounding reality by understanding the functioning and behaviour of complex systems and, consequently, improving them, that is, according to the terminology used by F. Vester, increasing their viability. For the purpose of the MISS, it is assumed that viability means, in particular, the ability of the system to (implicitly: continued, stable) functioning. Changing existing systems to increase their viability takes place in the Sensitivity Model at three main levels: system identification, pattern recognition (including recognising the different roles of activation variables in the system, and the behaviour of the system), and system evaluation. These levels can be divided into nine interrelated, mutually interacting operations, which are succinctly described below to illustrate a complete model. In addition, in the MISS only its selected elements are used, as described in more detail in the later sections of the paper.

1. System description (an overriding objective and specific objectives). The description of individual systems, i.e. organisations studied. The overriding objective of these organisations is, according to the system approach, their survival and development, used to maximise company value, with particular emphasis on the first element, understood as the sustainability of the organisation's existence, expressed in its ability to continue its operation.
2. Choice of the so-called system activating variables (filtering key data and variables that affect how the system works). In research

- using the MISS, the variables that activate the system, that is, the organisation, are its stakeholders as defined in the OS set.
3. Evaluating system relevance (selecting the most important variables in a controllable number that will allow for identifying and then evaluating the whole system); a tool: a matrix of criteria. In research using the MISS, a set of criteria for evaluating the system is a set of KPIs.
  4. Evaluating interactions (evaluating an impact and interdependencies between variables); the tool: a matrix of influence. In research using the MISS, a matrix of influence related to organisation's stakeholders is used.
  5. Determining the role of individual variables in the system (between four dimensions: active, reactive, critical, and buffering). In research using the MISS, the roles of individual organisation's stakeholders are defined and graphically represented on the map of the allocation of stakeholders' roles in the environment.
  6. Analysing general relationships/interdependencies in the system (the reflection of general tendencies in the system).
  7. Applying a cybernetic approach to individual scenarios.
  8. Forecasts "what if" and tests of various policies. In research using the MISS, scenarios can be simulated.
  9. System evaluation and strategy formulation. Based on the results of research using the MISS, conclusions and recommendations about stakeholder management for the organisations studied can be formulated.

The basic property of the Sensitivity Model is that its structure is recursive, that is, it always allows you to go back to the earlier stage of system analysis, change previously introduced data, and the results of subsequent stages can influence the results of the previous ones.

It should be emphasised that according to one of the most important assumptions of Vester's model, the most important thing in system management is to identify and focus on the few system elements of the highest value. In the MISS, this value is the stakeholders' influence on the achievement of the company's strategic objectives. This assumption is part of the pragmatic orientation of the MISS and an important justification for using the Sensitivity Analysis tools.

## THE METHODOLOGY FOR THE IDENTIFICATION OF STRATEGIC STAKEHOLDERS OF AN ORGANISATION – TOOLS AND A RESEARCH PROCEDURE

Prior to applying the MISS, it is recommended, for cognitive purposes, to conduct a preliminary stage of research in order to become familiar with the organisation's previous practices in identifying its stakeholders, for example, by means of free interviews with managers. They can be asked questions like: How does the organisation identify its stakeholders? What methods of stakeholder identification (including, but not limited to analysis, evaluation, and prioritisation) are used? What tools for stakeholder identification (including, but not limited to analysis, evaluations, and prioritisation) are used? Is the influence of stakeholders on the organisation's strategic objectives assessed? Before the interview, the respondents should be given the definitions of an organisation's stakeholder, stakeholder identification, and stakeholder management, discussed above and adopted for the purpose of the MISS.

### The identification of an organisation's stakeholders

The identification of an organisation's stakeholders aims to obtain an overall picture of the environment in which it operates. This is a kind of environment scanning, providing, among others, information about its boundaries and range of influence, the location and size of stakeholders in its defined areas, the categories or stakeholder groups that can be aggregated for the optimal allocation of resources as part of their management. It is important to consider stakeholders that belong to a range of networks (Prell et al., 2009), so as not to focus only on those previously known and active stakeholders as it might increase the chance of missing hidden, remote, or less obvious stakeholders (Reed, 2008).

Stakeholder identification is the starting point for further elements of the MISS, although the results already obtained at this stage may be used, *inter alia*, to verify organisational structures, to share responsibility for different areas of the environment, and to determine the scope of employees' responsibilities or to design the framework of a communication system.

**A set of organisation's stakeholders.** The first stage of research using the MISS is to map all the organisation's stakeholders to create

a set of the organisation's stakeholders (an OS set). Respondents are asked first to identify the stakeholders spontaneously and then they receive support in the form of a list of potential stakeholders of the organisation studied (developed each time by the researcher). They can then supplement or verify their responses. The set of the organisation's stakeholders (an OS set) is created during the first focus group session or interview (depending on the number of research participants). In the case of a focus group, a stakeholder will be added to the OS set if they are identified by at least one respondent. Based on the OS set, research participants identify strategic stakeholders before they start working with the MISS tools. This set of indicated strategic stakeholders (an iSS) is used to verify the research hypothesis by comparing it with a set of verified strategic stakeholders (a vSS set), developed by the MISS.

**The allocation of stakeholders' roles within the organisation's environment and the identification of critical stakeholders.**

The allocation of stakeholders' roles in the environment and the identification of critical stakeholders draws attention to the current and potential relationships and interdependencies of the different entities in the organisation's environment, allowing them to map their position, compared to one another. It provides tips on how to navigate in the organisation's environment, useful in long-term strategic decisions. It can be especially useful in identifying risks – both in the internal and external, the close and distant (Obłój, 2007) environments, anticipating stakeholder behaviour in the macro- and microenvironment for the needs of crisis management, or shaping expansion strategies by seeing opportunities for mergers and acquisitions in a competitive environment. Information obtained as a result of the interpretation of a map of allocation of stakeholders' roles in the environment can also be used successfully to plan activities in areas that are not critical to the functioning of the organisation. For example, they may be a starting point for formulating a CSR strategy, signalling which entities should become the beneficiaries of the support that results from the implementation of the concept of responsible business.

**A matrix of influence.** A matrix of the mutual influence of a company's stakeholders, in short, a matrix of influence, allows for evaluating the mutual influence of all stakeholders of the organisation studied included in the set of stakeholders based on the analysis of "everyone with each other". The influence of one stakeholder on another



is assessed by means of the ordinal scale with values ranging from 0 to 3, with the following interpretation of individual values:

- 3 – strong influence,
- 2 – moderate influence,
- 1 – weak influence,
- 0 – no influence.

According to F. Vester's recommendation on the size of a set of variables analysed in a system (2007, p. 187), the number of stakeholders analysed in the matrix should not exceed 20–30 because that number is manageable. An example of the matrix of influence is shown in Figure 1 and the matrix of influences with the calculated indicators referred to below – Figure 2.

No.	Stakeholder	A	B	C	D	E
1.	A	–	3	1	0	2
2.	B	1	–	3	2	1
3.	C	3	2	–	3	3
4.	D	0	1	2	–	1
5.	E	1	2	0	0	–

**Figure 1.** An example of the matrix of the influence of stakeholders in the organisation's environment

Source: own study.

After the evaluation of the influence of each stakeholder on each other, the active sum (AS) and the reactive sum (RS) are calculated for each stakeholder individually. The active sum is a measure of the influence of a given stakeholder on the environment; it indicates how strongly the stakeholder influences other participants in the environment analysed. On the other hand, the reactive sum is a measure of the influence of the environment on a given stakeholder; it indicates how much the stakeholder is susceptible to the influence of other participants in the environment analysed.

Further analysis of the matrix of influence gives answers to two fundamental questions:

1. Which stakeholders are able to initiate changes in the environment (system) or to challenge their temporary *status quo* (they are active), and who are more likely to absorb changes (they are reactive)?



2. How important are the stakeholders in the environment (system) analysed? Which stakeholders are critical and which are buffering in nature?

In order to receive an answer, two indicators are calculated for each stakeholder. The first is the quotient of its active and reactive sums (AS/RS), which is a measure of the intensity of the influence a stakeholder has on the environment (cf. Chodyński, Jabłoński, & Jabłoński, 2007, p. 62). It shows whether a given stakeholder is more active ( $AS/RS > 1$ ) or more reactive ( $AS/RS < 1$ ), while the values around 1 indicate a neutral nature.

The second indicator is the product of the active and reactive sums of the stakeholder ( $AS \cdot RS$ ), which is a measure of the importance of the stakeholder in the environment (cf. Chodyński et al., 2007, p. 62), that is, it determines the significance of their role. The significance of their role can be understood as the ability to evoke a reaction in a system. The higher the product is, the more important the role of a stakeholder, the so-called critical role, is. The lower the product is, the less important the role of a stakeholder, the so-called buffering (marginal) role, is. Stakeholders that play a critical role are characterised by relatively high AS and RS, compared to other entities in the environment. The ratio is determined by the following product line. A change in the behaviour/influence of a critical stakeholder may evoke a chain reaction throughout the system, and particularly initiate changes in the system if it is highly active or act as an early warning indicator if it is reactive.

No.	Stakeholder	A	B	C	D	E	AS	AS/RS	AS*RS
1.	A	–	3	1	0	2	6	1.20	30
2.	B	1	–	3	2	1	7	0.88	56
3.	C	3	2	–	3	3	11	1.83	66
4.	D	0	1	2	–	1	4	0.80	20
5.	E	1	2	0	0	–	3	0.43	21
		5	8	6	5	7	RS		

**Figure 2.** An example of the matrix of the influence of stakeholders in the organisation's environment together with the indicators

Source: own study.

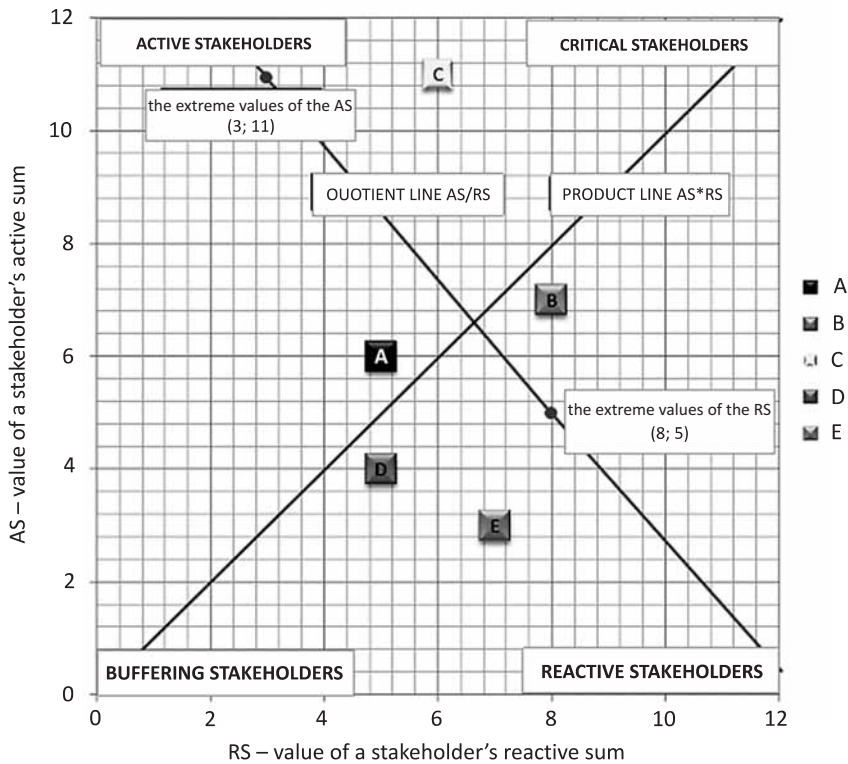
**A map of the allocation of stakeholders' roles in the organisation.** The map presented below (see Figure 3) is a graphical illustration of the allocation of the roles of individual stakeholders in the organisation studied in its environment. It allows for interpreting which stakeholders can be considered critical for a given organisation and form a set of its critical stakeholders (a CS set).

How to draw a map: Points representing all the stakeholders of the organisation from the OS set are marked on a coordinate system, whose axis of ordinates is the value of the active sum (AS) and the abscissa is the value of the reactive sum (SP). The coordinates of these points correspond to the RS values (X-coordinate) and AS (Y-coordinate), assigned to individual stakeholders in the matrix of influence (see Figure 2). Then two straight lines are drawn: the first is a quotient line and passes through the origin of the coordinate system and the point of coordinates (1; 1); the second is a product line that passes through the point where the coordinates are the extreme values of the active sum and the point of the coordinates being the extreme values of the reactive sum in the set of the organisation's stakeholders (OS).

Interpretation of the map: The stakeholders from the OS set (shown on the map as points in the coordinate system) above the quotient line are considered active (the quotient of AS and RS > 1). The stakeholders from the OS set that are below the quotient line are considered reactive (the quotient of AS and RS < 1).

The stakeholders from the OS set, who are above the product line, are critical stakeholders. They are a set of the critical stakeholders of the company (a CS set). The stakeholders from the OS set below the product line are buffering stakeholders.

The higher in the upper left corner of the map the point representing the stakeholder is, the more active the stakeholder is (the AS/RS quotient is growing). The lower in the bottom right corner of the map the point representing the stakeholder is, the more reactive the stakeholder is (the AS/RS quotient is decreasing). The higher in the upper right corner of the map the point representing the stakeholder is, the more important the role of the stakeholder in the company's environment is (the AS\*RS product is growing). The lower in the bottom left corner of the map the point representing the stakeholder is, the more marginal, the less important the role of the stakeholder in the company's environment is (the SA\*SP product is decreasing).



**Figure 3.** An example of the map of the allocation of stakeholders' roles in the organisation's environment

Source: own study.

The map below indicates that the critical stakeholders of the model company analysed are stakeholders identified by symbols B and C, and the stakeholder C is active, and B is reactive. The stakeholder A is active but plays a buffering role in the environment. Other stakeholders, D and E, are buffering and reactive.

### **The selection of key performance indicators as the indicators and measures of the achievement of the organisation's strategic objectives and the identification of key stakeholders**

The analyses conducted in this part primarily support decisions regarding the management of the closer environment, i.e. the organisation's market and internal environment. Their considerable application potential in operational management, for example in human resources management or customer relationship management, is recognised as

it allows for evaluating the direct influence of stakeholders on the achievement of organisational goals, leading to the identification of the key stakeholders. A set of key performance indicators (KPIs), through which this assessment is made, enables monitoring of critical business areas and their prioritisation by focusing on monitoring and comparing the key performance indicators over time. The specific values of KPIs can also be used to determine the boundary conditions of the company's functioning, allowing for defining the state of stable operation of its systems.

**A matrix of stakeholders' influence on the key performance indicators.** Before building a matrix of stakeholders' influence on the KPIs, research participants give a set of key performance indicators, which they subsequently rank by assigning weights of between 1 and 3 to them. The ordinal scale for the weights is interpreted as follows:

- 1 – an important indicator,
- 2 – a very important indicator,
- 3 – a prime indicator (highest weight).

In the matrix of influence on the KPIs, all of the organisation's stakeholders from the OS set are evaluated in terms of whether or not they influence the individual KPIs. The influence of each stakeholder on each indicator from the set of KPIs prepared by the respondents is analysed. The influence of a stakeholder on a given KPI is assessed based on the following ordinal scale:

- 0 – no influence of a stakeholder on the indicator,
- 1 – weak influence,
- 2 – moderate influence,
- 3 – strong influence.

A weighted value of the influence of a stakeholder on a given indicator is the product of the value of the influence on the selected indicator and the weight previously assigned to the indicator. For example, if a stakeholder exerts a moderate influence (influence value = 2) on an indicator with the weight of 3, the weighted value of its influence on this indicator is 6 ( $2 \times 3$ ). The sum of weighted values of the influence of a stakeholder on individual KPIs represents the total value of the stakeholder's influence on the KPI (TVI), which shows whether and to what extent the stakeholder is crucial for the company studied. An example of the matrix of the influence of stakeholders on KPIs is shown below (see Figure 4). Stakeholders for whom the total value of influence on the KPI (TVI) set is higher than the TVI arithmetic mean for the

entire OS set are considered key stakeholders. They form a set of key stakeholders of the organisation studied (a KS set). While the MISS was being designed, the use of medians as a means of selecting key stakeholders was considered, but the measure was rejected in favour of the arithmetic mean because of the excessive underestimation of the TVI limit (above which the stakeholder is considered key) in the set where for some stakeholders  $TVI = 0$ .

Indicator	Weight of an indicator	Stakeholders				
		A	B	C	D	E
KPI 1	3	6 (2)*	0 (0)	9 (3)	3 (1)	0 (0)
KPI 2	2	6 (3)	2 (1)	2 (1)	0 (0)	0 (0)
KPI 3	1	2 (2)	0 (0)	1 (1)	1 (1)	1 (1)
	TVI	14	2	12	4	1

\* The value given in brackets is the evaluation of the influence that a stakeholder has on KPIs, the value before the bracket is the weighted value of the influence of a stakeholder on the indicator, i.e. the product of the value of the influence and the weight of the indicator.

**Figure 4.** An example of the matrix of the influence of stakeholders on key performance indicators

Source: own study.

**Identification of the organisation's strategic stakeholders .** The collation of the sets of critical stakeholders (CS) and key stakeholders (KS) of the organisation studied helps the research participants to make decisions which stakeholders should be considered strategic for the organisation after verification by the MISS.

Respondents identify verified strategic stakeholders verified (vSS) of the organisation studied from these two sets. They then define the character of both the direct and indirect influence individual strategic stakeholders have on the organisation's strategic goals, according to the following nominal scale:

- definitely positive character,
- definitely negative character,
- character which is more positive than negative,
- character which is more negative than positive,

- neutral character,
- the character of influence cannot be determined (is unknown or too changeable).

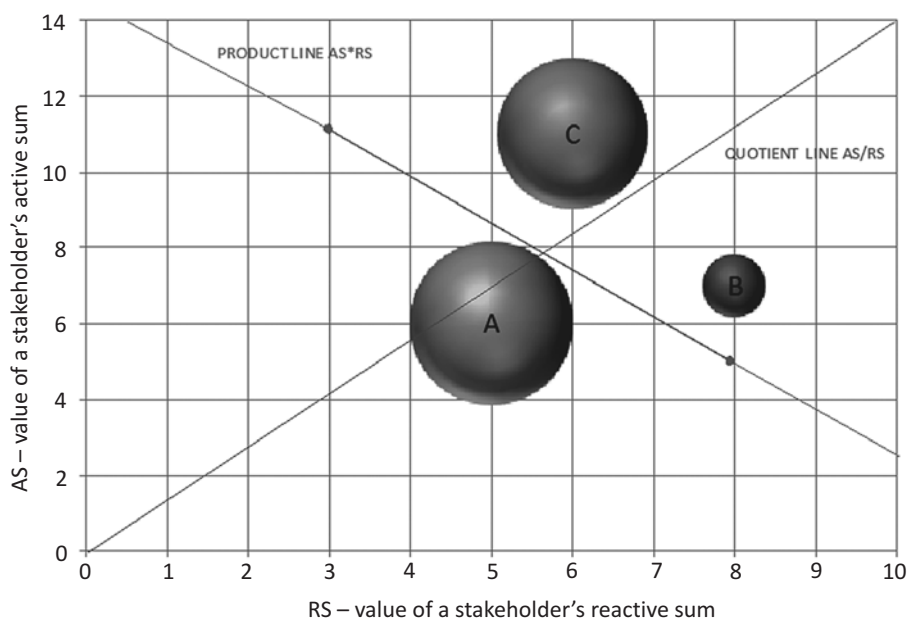
In order to correctly interpret the above scale, it should be made clear that the positive influence of a stakeholder on the organisation's strategic objectives means in particular: enabling, supporting, facilitating, or accelerating the achievement of an objective/objectives. The negative character of the influence means in particular: preventing, hindering, blocking, inhibiting, or delaying the achievement of the company's strategic objective/objectives (including, for example, forcing the change of objectives).

**A map of the organisation's strategic stakeholders.** The results of the above stage of stakeholder identification are presented as a map of the strategic stakeholders of the organisation studied (see Figure 5). The map of verified strategic stakeholders is based on the map of the allocation of stakeholders' roles in the company's environment (see Figure 3) and only those points are kept that represent stakeholders from the set of verified strategic stakeholders (vSS). The third parameter characterising these points is introduced, namely the total value of an influence that stakeholders have on KPIs (TVI). This parameter is graphically represented on the so-called bubble chart by the bubble size corresponding to a point. In addition, the colour code (parameter 4) is introduced, and the colour of the bubble-point shows the character of the stakeholder's influence on the achievement of the company's strategic goals (see Table 2).

**Table 2.** Colour code defining the character of stakeholders' influence on the achievement of the organisation's strategic goals

Positive character (dark green)
Character which is more positive than negative (light green)
Character which is more negative than positive (orange)
Definitely negative character (red)
Neutral character (yellow)
The character of influence cannot be determined – it is unknown or too changeable (grey)

Source: own study.



**Figure 5.** An example of a map of the organisation's strategic stakeholders

Source: own study.

The comparison of the iSS set with the previously described vSS set allows for the verification of the research hypothesis assuming that the set of strategic stakeholders identified by the MISS differs from the set of strategic stakeholders identified by the intuitive approach.

## The use of MISS tools to simulate scenarios

The MISS allows for conducting the simulations of scenarios prepared by research participants and thereby studying whether and how the map of strategic stakeholders changes in specific economic or market situations, and in particular, crisis situations for the organisation and/or crisis situations that can lead to, for example, changes to the behaviour of stakeholders (the strength and direction of their influence) and/or change to the strategy and/or strategic goals of the organisation. Simulations consist in changing selected input data entered into the previously described research tools and may include:

- changes to the OS set (e.g. the emergence of new stakeholders),
- changes to the mutual influence of stakeholders leading to changes in roles of stakeholders in the organisation's environment, which could result in changes in the CS set,
- changes to the set of the organisation's KPIs (e.g. adding, removing, or modifying an indicator),
- changes to the weights assigned to KPIs and/or changes to the evaluation of the influence that stakeholders have on KPIs, which may result in changes to the KS set.

## CONCLUSIONS

The study highlighted the need for a systematic, coherent approach to stakeholder identification and proposed an original framework together with a new stakeholder typology scheme in the light of value-based strategic management. The aim of the article was to present the methodology that aims to assist managers in prioritising the competitive needs of stakeholders by systematically assessing the potential of their direct and indirect influence on the functioning of the organisation (and being influenced by it), taking the strength and character of the influence into account, as well as interdependencies between the participants of a given configuration. The MISS derives from the concept of network thinking and is part of a holistic and systemic approach to the stakeholder management, especially in strategic terms.

The results of research using the MISS guide decision-makers to focus an organisation's resources on the few system elements of the highest value. In stakeholder management, this means identifying stakeholder groups that have or may have a significant influence on the organisation's ongoing operations and development.

In its design, the MISS is assumed to be particularly useful in management practice, responding to the needs of today's organisations for tools that enable an acceptable and expected balance between their effectiveness and efficiency, reliability, and complexity of application.

The MISS aims to support both strategic and operational decision making in organisations, and therefore the potential of its application is significant. This approach can be applied in various functional areas of administration, in the various conditions of the organisation's



environment, and can accompany or complement various management concepts. Therefore, in order to maximise the information potential of the MISS, it is advisable, on the one hand, to combine it with other methods of analysing the company's environment and, more broadly, with management concepts. On the other hand, the information it provides can be helpful in the implementation of many of these concepts, particularly in human resources management (e.g. when developing incentives and employee evaluation systems and identifying key human resources competencies), customer relationship management (e.g. market segmentation, target group analysis, assessment of the usefulness of building and developing relationships, and assessment of distribution channel profitability), supply chain management (e.g. as a basis for decisions on vertical integration or the diversification of supply sources), and corporate communications management (consolidating all other areas of management through information exchange), particularly in PR, lobbying or corporate social responsibility activity. The use of the MISS in these areas is not intended to modify the existing management approach based on well-established concepts, but to raise the awareness of the need to integrate these areas within the system of stakeholder management and to instil in the managers the mentality of looking at the organisation holistically.

Moreover, the environment, the system of forces and dependencies in which the organisation operates undoubtedly influences the perception of its values, it is therefore believed that the methods of analysing the organisation's environment, including the MISS, provide valuable information about its current and expected ability to generate value for present and future owners. For this reason, they can support investors in estimating both the tangible and intangible value of a company, complementing the classic methods of company valuation.

Being aware that the MISS does not constitute an ultimate and universal framework for identification of the strategic stakeholders of an organisation, the author indicates its limitations, as well as suggests further improvements and future research directions.

The proposed model is limited to a few aspects of the stakeholders' role and impact as well as to the managerial perspective in the assessment thereof. Decision-makers' interpretation of information about the stakeholders is by definition subjective and involves ambiguity in their reading of the environment, e.g. whether the pressures/influences pose threats or opportunities for the organisation (George et al., 2006).

In order to improve the framework, the recommended methods of data gathering (focus group and individual structured interviews) can be integrated with online interactions and big data analytics, which might supplement the managerial assessment with valuable qualitative data. Crucial for the model itself would be improvements to the algorithms and the mathematical aspect in general, which can surely lead to a better reflection of reality in which the studied system operates or adjusts to e.g. the type of organisation or the number of stakeholders in a given environment.

For further studies, researchers are encouraged to respond to a need to both explore stakeholder theory and test empirical models in relation to the recent challenges to management – a value-based, competitive perspective merged with accountability and sustainability concepts. First of all, the proposed model can be empirically tested in different countries and industries (manufacturing and services), in small, medium and large companies, or in different organisational cultures. It will also be interesting – with the help of MISS – to assess stakeholder influence on organisations with proactive or reactive strategies toward the environment in which they operate. This can define an application scope of the MISS as well as check the adaptability of its tools.

Further research can also derive from stakeholder classification schemes presented in the literature, and incorporate them into the MISS in order to provide a multi-level classification which can be helpful for designing and executing different functional strategies of organisations. While taking a holistic approach to stakeholder identification and management, it seems adequate to also consider other aspects or characteristics (not included in the MISS) of environment participants, for example stakeholders' satisfaction or engagement. Finally, it is worth observing how various organisations – once their stakeholders are identified and prioritised – address competing stakeholder interests, how they deal with trade-offs, and how they deliver value.

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## MISI – METODYKA IDENTYFIKACJI STRATEGICZNYCH INTERESARIUSZY ORGANIZACJI

### Abstrakt

**Tło badań.** Biorąc pod uwagę charakter i dynamikę otoczenia współczesnych organizacji, konieczne i istotne stało się zarządzanie interesariuszami. Warunkiem jego skuteczności jest trafna identyfikacja tych grup, które faktycznie determinują zdolność organizacji do osiągania jej celów. Potrzebę identyfikacji interesariuszy uzasadnia również nadrzędny cel zarządzania, związany z maksymalizacją wartości organizacji, z uwagi na to, że interesariusze mogą być traktowani jako obszary wzrostu wartości w otoczeniu bądź posiadacze czynników kreacji wartości. Zarówno wyniki przeglądu literatury, jak i doświadczenia Autorki z praktyki zarządzania wskazują na potrzebę opracowania przystępnych dla decydentów narzędzi wspomagających identyfikację interesariuszy organizacji oraz analizę i ocenę ich wpływu na jej funkcjonowanie.

**Cele badań.** Celem niniejszego artykułu jest szczegółowe zaprezentowanie autorskiej metodyki identyfikacji strategicznych interesariuszy organizacji, pozwalającej na rozwiązanie problemu badawczego w postaci oceny wpływu interesariuszy na realizację celów strategicznych organizacji, a w rezultacie zidentyfikowanie interesariuszy o znaczeniu strategicznym.

**Metodologia.** MISI to metodyka wraz z zestawem narzędzi wspierających menedżerów w zakresie analizy i oceny wewnętrznego i zewnętrznego otoczenia ich organizacji, na które składają się różne grupy interesariuszy. Analiza i ocena prowadzone są wieloetapowo i prowadzą do priorytetyzacji interesariuszy oraz wyłonienia tych o znaczeniu strategicznym dla funkcjonowania badanej organizacji. Metodami gromadzenia danych na potrzeby MISI są zogniskowane wywiady grupowe oraz strukturalizowane wywiady indywidualne.

**Kluczowe wnioski.** MISI wspiera procesy decyzyjne w organizacjach, umożliwiając decydentom systematyczną ocenę potencjału bezpośredniego oraz pośredniego wpływu interesariuszy na realizację strategicznych celów organizacji. Wyniki analiz pozwalają wskazać elementy systemu (otoczenia organizacji) o największej wartości, determinując tym samym alokację zasobów. We wnioskach wskazano również potencjał aplikacyjny MISI w szerszym kontekście zarządzania organizacją, ograniczenia modelu oraz kierunki dalszych badań.

**Słowa kluczowe:** interesariusze, identyfikacja interesariuszy, otoczenie organizacji, zarządzanie strategiczne